

07222021 / 23072021 -- Consortium Leadership Community Meeting

Date and Time:

22 July 2021 - All items on the board
17:33 (UTC+00:00)

Facilitator:

Brian Parker

Attendees:

Mindee, Janet Herrington, Gawain, Lauren Gruber, Mindee, Dana (she/her) Atlanta Ballet

Summary:

Actions:

Learnings:

Topics discussed:

Keeping the Individuals on Household records (A1 and A2 and beyond) accurate with Memberships as Product.

Votes: 4

Suggested by: Janet Herrington

Comments:

- Brian Parker
Janet: Primary focus starting with Tessitura was to get Membership information in to allow for discounted program sales. Old membership system allowed for memberships to be shared by patrons who are unrelated, and some of this carries through to current membership approach. However, this does not result in a pure dataset to track contribution history in these cases. Not currently sharing records with other organizations in the consortium setup. Seeking help to account for the complexities of Memberships in this kind of setting.
- Brian Parker
Mindee: Memberships purchased end up on the household, but Relationships are used to identify people who need to be able to access membership benefits. Another organization

uses recipients as members from purchases. Merge procedures and household reconstructions can cause issues in the shared database related to individual records holding onto a Membership if that's the desired outcome.

- Brian Parker
Janet: Also looking ahead to changes to the Membership structure at re-opening in October 2021.
- Brian Parker
Janet: Museum memberships are changing in meaningful, structural ways right now.
- Brian Parker
Mindee: Managing Relationships for Memberships has been a solution for this, and fairly foolproof though manual.
- Brian Parker
Mindee: Not currently used with scanners, because those are not implemented for Kalamazoo organizations.
- Brian Parker
Gawain: Constituencies can be used to scan into areas (not direct ticket scanning to a performance).

Virtual TLCC2021: How to ensure that this year's attendees stay engaged while joining from the office, and how to plan for "bringing the conference home" when we never left

Votes: 4

Suggested by: Brian Parker

Comments:

- Gawain
Require that they set an email autoreply!
- Gawain
Conquering the broader conference day schedule (7 to 7)
- Brian Parker
Janet: Time zone means most sessions will either be very early or very late. Encouraging attendees to treat the virtual conference as though they are actually away at an in-person conference.
- Brian Parker
Gawain: Everyday emphasis on information that you're looking to "take home" to your organization. Extreme focus on "bringing one thing home" to be less overwhelming. Bonus if that one thing can save a whole bunch of money or energy. Post-conference meeting where all attendees share their one big action item.
- Brian Parker
Lauren: Meetings before and after the conference to ensure coverage of all the sessions and topics that people are interested, and also to ensure that people have accountability after the fact.
- Brian Parker
Janet: Also important to use the conference to understand what is not currently possible to take away and return to the organization to stop having unproductive conversations.

So, I tried once to create a management system for security groups.

Votes: 4

Suggested by: Gawain

Comments:

- Brian Parker
Gawain: Difficulty in working with security groups in Tessitura. Sometimes groups even had specific employee names tied to them due to the specific nature of access required. Desire to establish a role-based approach to security and user groups. Hierarchical structure of various roles assembled into singular user groups. System of creating security groups composed of multiple other security groups; narrowed down to three effective security access levels. Job-based roles, as well as organization-based roles. Additional tiers based on which organization you work for, as well as specific job title/responsibility. The work has proven it is possible to achieve, but the actual processes are tedious. Questions about how easy it is to set up an overall structure that can be applied in every single case.
- Brian Parker
Janet: Shared a spreadsheet of current ways to consider security objects across multiple groups, which is apparently a new tool provided by Tessitura.
- Brian Parker
Mindee: Difficult to standardize access across multiple organizations in Kalamazoo because of different needs for access across the membership.
- Gawain
Mindee: organizes spreadsheets based on the interface structure instead of the alpha listings from the security tool.
- Gawain
Brian: has very locked down set of security "levels" which are used by all organizations.

Live to Test Scheduling

Votes: 3

Suggested by: Gawain

Comments:

- Brian Parker
Gawain: Does anyone have a plan for managing these requests across multiple organizations? Current example is an organization wanting to review information in the middle of implementation while another organization is getting ready to train for a new on-sale.
- Brian Parker
Mindee: Also primarily using email to coordinate these types of requests.
- Brian Parker
Janet: Could be helpful to identify times of the year where it's never a good time for LIVE to TEST copies due to ongoing building or preparing to open sales for a new season.

Topics voted on but not discussed:

Gotta catch 'em all: Consortia approaches to handling new sublicense recruitment and prospecting

Votes: 2

Suggested by: Brian Parker

Comments:

Every day is exactly the same: How to creatively combat burnout and fatigue

Votes: 1

Suggested by: Brian Parker

[Comments:](#)